ANIMAL WELFARE AND THE UK'S LEADING FOOD RETAILERS

Peter Jones and Daphne Comfort
University of Gloucestershire, UK

pjones@glos.ac.uk

Abstract

This paper offers an exploratory review of how the UK's leading food retailers have publicly addressed animal welfare. The findings reveal that six interlinked themes, namely, strategic corporate commitment, animal welfare as good business policy, a focus on supply chains, policies on specific categories of animals and animal products, antibiotics, and auditing, illustrated the food retailers' approach to animal welfare. The authors raise a range of issues about the companies approach to animal welfare, including the aspirational nature of their commitments, the emphasis on regular audits, the role of external assurance in the reporting process, animal welfare pressure groups, and the impact of COVID-19. The paper offers an accessible review how some of the UK's leading food retailers have publicly addressed the issue of animal welfare.

Keywords: *Animal welfare; animal welfare statements; food retailers; supply chain; audit; external assurance*

INTRODUCTION AND LITERATURE REVIEW

The UK's major food retailers have a range of impacts on the environment, on society and on the economy, and academic research has focused on the corporate challenges for, and the retailers' strategic and operational responses, to those challenges (e. g. Rimmington et al. 2006: Jones et al. 2007; Hartmann 2011; and Souza-Monteiro and Hooker 2017). More specifically, the UK's leading food retailers have looked to address a number of issues, including climate change, health and well-being, human rights and labour standards, the communities in which they operate, supply chain relationships, business ethics, plastics and packaging, food waste, working relationships and animal welfare, in their annual corporate social responsibility reports. However, while the issue of animal welfare within the food industry has attracted attention in the literature, (e.g. Lever and Evans 2017; Buller and Roe 2018), relatively little research has been published on the food retailers' approach to animal welfare. This exploratory paper looks to add to this work by reviewing, and reflecting on, how the UK's leading food retailers have publicly addressed animal welfare. The paper includes an outline of the characteristics of animal welfare, a cameo literature review to provide an academic context and set of reference points for the paper, a review of the top ten UK food retailers' approach to animal welfare, some reflections on this approach, and some suggestions for future research.

ANIMAL WELFARE

The welfare of farm animals generates vociferous and passionate debate, and it has attracted increasing attention in the academic literature. Clark et al. (2016), for example, recognised that increases in productivity may have negative impacts on farm animal welfare in modern animal production systems, and provided a systematic review of public attitudes to animal welfare. Their review suggested that 'the public are concerned about farm animal welfare in modern production systems' and that 'naturalness and humane treatment were central to what was considered good welfare' (Clark et al. 2016, p. 455). While consumer concerns about animal welfare are expressed in a variety of ways, for many people their closest, though indirect, contact with animal welfare is through the food they buy, and then eat. That said, animal welfare seems removed from the social practices of buying, cooking, and eating animal products. Buller and Roe (2018, p. 9), for example, argued 'we largely take farm animals' lives (and deaths) for granted when we eat them and their products' and they suggested 'for most of us, meat, egg and dairy consumption has become so distinct – geographically, morally aesthetically - from livestock, that the animal disappears.' More specifically, Buller (2016, p. 422) claimed 'shopping for welfare-friendly food products becomes an act of care-at-a-distance'

Animal welfare is concerned with the general health and wellbeing of animals and spans a wide range of issues from the care of family pets, to the exploitation and abuse of animals. The welfare of animals generates fiercely contested debates and while some voices stress the vulnerability of animals, for example, in intensive factory farms and medical research, others emphasise the need to increase food supplies and to develop new and better medicines. Essentially, the concept of animal welfare is concerned with how an animal is coping with the conditions in which it lives, and it is generally seen to include three elements, namely, an animal's normal biological functioning; its emotional state; and its ability to express (most) normal behaviours.

As such, the American Veterinary Medical Association (2020, webpage) suggested that an animal is seen to be in 'a good state of welfare if (as indicated by scientific evidence) it is healthy, comfortable, well-nourished, safe, able to express innate behavior, and if it is not suffering from unpleasant states such as pain, fear, and distress', and it argued that 'ensuring animal welfare is a human responsibility.' More popularly, commitments to animal welfare are often characterised by the 'Five Freedoms', drawn up by the UK's Farm Animal Welfare Council (2009, webpage), namely freedom from hunger and thirst: freedom from discomfort; freedom from pain, injury or disease; freedom to express normal behaviour; and freedom from fear and distress. At the same time, Red Tractor Scheme (2020), the UK's largest food standards scheme, offers assurance that farm animals are healthy with suitable living space and access to food, and water.

In some ways, the UK can be seen to have been a pioneer in animal welfare with legislation on the treatment of cattle dating back to the 1820's, and in more modern times the Animal Welfare Act was passed in 2007, and made owners and keepers responsible for ensuring that the welfare needs of their animals are met. These include the need 'for a suitable environment, for a suitable diet, to exhibit normal behaviour patterns, to be housed with, or apart from other animals (if applicable)' and 'to be protected from pain, injury suffering and disease' (GOV. UK 2019). The UK's most recent advice and guidance on protecting animal welfare on farms, in transport, and at markets, includes welfare regulations on poultry farming, laying hens, broiler chickens and breeder chickens, pig farming, sheep and goats, beef cattle and dairy cows and deer farming.

CAMEO LITERATURE REVIEW

During the past two decades, the corporate social responsibility strategies adopted by food retailers to address their impacts on the environment, on society and on the economy, have attracted a wide range of deal of attention in the academic literature. However, the aim here is not to summarise this extensive literature, but rather to provide a cameo literature review of a small number of empirical and conceptual issues, which seem to provide some simple reference points to, and context for the issues raised in the paper. On the empirical side, some two decades ago, Piacentini et al. (2000), conducted an audit of food retailers to establish the nature and extent of corporate social responsibility activities, and they suggested that while some of the retailers acknowledged the benefits of being recognised as a socially responsible company, customer satisfaction and maximising profitability were seen as much more important than philanthropic motives. Jones et al. (2007) explored how the UK's leading food retailers employed corporate social responsibility to market to customers within stores. Their findings indicated that at that time, the major corporate social responsibility themes being employed, were value for money, support for local food producers, Fairtrade, healthy living and healthy eating, commitment to organic products, charitable donations, and initiatives to support the local community.

Anselmsson and Johnson (2007) examined the significance customers placed on different aspects of corporate social responsibility when evaluating and purchasing a retailer's own brand produce. Their work suggested that it is possible to build a corporate social responsibility image for these brands, and that such images can have a positive impact on the customers' intention to buy. In looking to explore the critical and notoriously elusive issue in corporate social responsibility research', namely 'the impact of corporate social performance on the bottom line', (Pivato et al.'s 2007) research on consumers of organic produce, revealed that a retailer's corporate social responsibility performance influences consumer trust, and that it in turn can influence brand loyalty. More recently. Souza-Monteiro and Hooker (2019) examined how socio-economic and institutional factors impacted upon UK food retailers' corporate social responsibility strategies, as revealed in corporate communications and product marketing. They concluded that corporate social responsibility strategies were increasingly being used not only to improve goodwill and reputation, but also as a competitive tool. Research by Jones et al. (2014) on the leading UK food retailers' approach to corporate social responsibility, suggested that independent external assurance of much of the information in the corporate social responsibility report had, at best, been limited.

More specifically, limited research has been published on the leading food retailers' approaches to animal welfare. Lindgreen and Hingley (2003) examined the approach taken by Tesco to deal with consumers' concerns about animal welfare, and found that the retailer had worked with its suppliers to address such concerns, and suppliers were evaluated using a series of detailed key performance indicators. In classifying groups of themes in food retailers' corporate social responsibility reports and on own label products, Souza-Monteiro and Hooker (2017) suggested that health and safety and the environment were the most popular group, while animal welfare, along with community, biotechnology and novel foods were in the second rank of groups. Schulze et al. (2019), looked to explore how food retailers were motivated to take on the marketing of products with increased animal welfare standards, and their findings suggested that a focus on animal welfare can not only achieve more successful marketing, but can also help both consumers and farmers to change their consumption and production habits.

On the conceptual side, while Garriga and Mele (2014, p. 51) suggested that corporate social responsibility 'presents not only a landscape of theories but also a proliferation of approaches, which are controversial, complex and unclear', two sets of theoretical approaches seem relevant here. Firstly, stakeholder theory emphasises that corporate social responsibility is about meeting the needs of all of a company's stakeholders, including the company itself, customers, employees, suppliers and society at large. Gavare and Johansson (2010), for example, argued that companies must be increasingly sensitive to the needs and concerns of a wide range of stakeholders. Secondly, there have also been attempts to develop theoretical approaches which seek to locate corporate social responsibility within wider economic, political and social structures, Castro (2004), for example, looked to develop a more critical approach and argued that economic growth relied on the continuing exploitation of both natural and social capital. Hanlon and Fleming (2009, p. 938), for example, suggested that corporate social responsibility is an 'ideological smoke screen designed to either soften the image of firms engrossed in the rampant pursuit of profit (at any cost) or as a way to deflect attention away from an unsavoury core business model.' Some social scientists (e. g. Springer 2010) see neo liberalism shaping contemporary political, economic, and social policy processes by emphasising free market mechanisms, a minimal role for the state and corporate and individual responsibility.

METHOD OF ENQUIRY

In looking to undertake an exploratory review of how the UK's leading food retailers have publicly addressed animal welfare, the authors chose a simple method of enquiry, which they believe to be fit for purpose. The UK's top ten food retailers (Retail Economics 2020), as measured by market share in 2018/2019, namely, Tesco, Sainsbury's, Asda, Morrisons, Aldi, Co-op, Marks and Spencer, Waitrose, Lidl, and Iceland, which collectively account for some 90% of the UK market, were chosen for study. An Internet search was then conducted using the name of each of the ten food retailers and animal welfare as the key phrases. The search was undertaken in September 2020 using Google as the search engine. The information generated by this search process provided the empirical information for this paper. This information is in the public domain and the authors took the considered view that they did not need to contact the selected food retailers to obtain formal permission prior to using the information on animal welfare.

The paper looks to provide an exploratory review of how the leading UK food retailers publicly addressed animal welfare, rather than a systematic or comprehensive analysis of animal welfare issues within the UK's food retail industry. The paper draws heavily on selected quotations drawn from the food retailers' corporate websites. The aim here, is to explore how the retailers publicly expressed, and evidenced, their commitment to animal welfare, and the authors took the view that this was perhaps best captured in the retailers' own words, not least in that quotations could convey the corporate authenticity of the findings and offer greater depth of understanding (Corden and Sainsbury 2006). When outlining the issues of the reliability and validity of the information drawn from Internet sources, Saunders et al. (2009), emphasised the importance of the authority and reputation of the source and the citation of a specific contact who could be approached for additional information, and in collecting the retailer's information on animal welfare, the authors felt that these two conditions were met.

FOOD RETAILERS' APPROACHES TO ANIMAL WELFARE

All the top ten UK food retailers posted animal welfare statements and policies, which articulated their approach to animal welfare, on their corporate websites. That said, there were marked variations in the extent of the material posted by the leading food retailers. Thus, while Sainsbury's, the Co-op and Lidl posted animal welfare reports on the corporate websites, Asda's animal welfare policy was described on one page, while the corresponding coverage posted by Iceland and Morrison, ran to two and three pages, respectively. However, rather than describing each retailer's approach, the aim here is to draw out a number of themes that illustrate their approach to animal welfare. More specifically, six interlinked themes can be identified, namely, strategic corporate commitment, animal welfare as good business policy, a focus supply chains, policies on specific categories of animals and animal products, antibiotics, and auditing.

Strategic commitment was expressed in a variety of ways. In outlining 'why animal welfare is important to us', the Co-op (2019, p. 2), for example, reported 'we know that animal welfare is important to our customers and members, so we are committed to creating products that have been produced to good animal welfare standards, regardless of their budget.' Further, the Co-op reported that in developing its standards and policies, it had followed the Five Freedoms of animal welfare mentioned earlier in this paper. More succinctly Asda (2017, webpage) claimed 'we care about animal welfare' and reported using 'the framework of the Five Freedoms' to define its animal welfare policies. A number of the leading retailers, including the Co-op, Morrisons and Lidl, reported that the approach to animal welfare was assessed through the Red Tractor scheme. Aldi (2020, webpage) emphasised 'animal welfare is an important part of being a responsible business and we are committed to the continuous improvement of animal welfare in our food and food products.'

At the same time, the leading food retailers also argued that their commitments to animal welfare were vitally important to their businesses. Waitrose (2019), for example, asserted its belief that 'animal welfare and good business go hand in hand, because our customers expect and rely on us to be doing the right thing' and 'rearing livestock well and ensuring that high quality standards apply throughout the animal's life are vital to ensuring the quality of the meat and fish we sell.' Sainsbury's (2019, p. 2), argued 'treating animals well and keeping them healthy is not just the right thing to do, it also makes good business sense' and that 'healthy well-managed animals are more likely to deliver better-tasting, higher quality products that our customers enjoy buying and consuming. In a similar vein, Lidl (2020, p.3) claimed 'the welfare of farmed animals forms a key part of our continued dedication to our sustainability strategy' and 'we believe this is in the interests of both our business, ensuring integrity and sustainability, and our customers who have told us that they are increasingly interested in buying produce that has been produced and sourced with strong welfare considerations.'

The leading food retailers explicitly acknowledged the importance of their supply chains in addressing animal welfare. In outlining its approach to 'working in partnership with farmers and suppliers' Sainsbury's (2019, p. 3), for example, stressed its commitment to 'working with our farmers to continuously improve the lives their animals lead' and that all its farmers have to meet 'exacting animal health and welfare standards.' Marks and Spencer (2020, webpage) suggested 'good food starts with good ingredients – and the best ingredients come the best farmers. That's why we only work with producers who share our commitment to animal welfare.' Tesco (2017, webpage) claimed 'we work collaboratively with our suppliers, grower, farmers and fishermen… to identify ways in which high standards of animal welfare can be assured in a manner which is achievable for our supply base.' Asda (2017, webpage) simply claimed 'we're making improvements across our supply chain to make sure that livestock is treated properly at every step on the process', and Morrisons (2020, webpage) reported 'we take animal welfare seriously, from working with animals up to the point of slaughter.' Lidl (2020, p. 6) claimed that its animal welfare standards 'are continually evolving and go beyond legal requirements through all stages of the supply chain', while Iceland (2020) simply reported 'we work with our suppliers to ensure high standards of animal welfare based on the Five Freedoms.'

Several of the leading food retailers have policies for specific categories of animals and animal products. Sainsbury's (2019, p. 6), for example, claimed 'we adapt our animal health and welfare approach to meet each species' particular needs.' In outlining its policy on lamb, for example, Sainsbury's (2019, p. 9) reported 'we make sure that our lambs are reared as naturally as possible', that 'they stay with their mothers, suckle freely, and live in family groups until they are weaned' and that 'after that lambs stay together as a group but their diet is based entirely on grass and forage.' Waitrose (2019, webpage) claimed that all its beef is from British cattle, that 'our farmers adhere to strict protocols to ensure the highest standards of husbandry and welfare to ensure stress-free, naturally produced healthy cattle', and that 'during spring and summer, our cattle are reared on open pasture in social groups and during winter protective shelter is made available in bedded barns.' Lidl (2020, p. 12) emphasised that 'pigs and

sows must have access to environmental enrichment and be provided with adequate manipulable materials throughout their lives.' The Co-op (2019, p.8) reported that all the milk used for block butter, cheese and yoghurts is 100% British and that it looks to 'improve animal welfare through the monitoring of herd health and proactive practices.'

Antibiotic resistance is a major public health issue and the increased use of antibiotics in both human and veterinary medicine has enhanced naturally occurring resistance. Waitrose 2019, webpage), claimed that within its supply chain, 'all antibiotics are used carefully, under strict protocols and only in controlled circumstances.' Sainsbury's (2019, p. 4) focus 'is on preventing the need for antimicrobial intervention by improving the overall health status on our supplying farms.' Lidl (2020, p. 7) argued 'the use of antibiotics should not be a replacement for good animal husbandry', that 'we encourage our suppliers to optimise welfare, health, hygiene and the biosecurity of animals in order to reduce the need for antibiotic treatments, and that suppliers were to use antibiotics 'as little as possible and as much as necessary, while keeping animal welfare as the primary focus.' More generally, most of the leading food retailers also had a range of animal welfare policies, covering cloning and growth promoters, confinement, permitted mutilations, stunning and slaughter, research, development and training and transport.

Many of the leading food retailers reported their commitment to auditing designed to ensure animal welfare. Under the banner 'making sure our standards are met', Sainsbury's (2019, p. 3), for example, claimed 'we implement our farm animal and welfare policies by working with independent auditors, suppliers and processors, and directly with our farmers.' Further, Sainsbury's (2019, p. 3) reported monitoring compliance with its various animal welfare policies 'both through factory audits, carried out by our internal teams, and via on-farm audits undertaken by our agricultural consultants and third party assessors.' The Co-op (2019, p. 4) reported 'all farms supplying us with meat, poultry or dairy products may be subject to audits either by the Co-op or an appointed audit body at any time.' Lidl (2020) emphasised that all its food producers are required to complete annual audits that cover a multitude of standards including animal welfare credentials. Under the banner, 'auditing and compliance', Waitrose (2019, webpage), claimed that 'all our supply chains are independently audited', that 'we conduct our own responsible sourcing assessments' and that 'farms are independently audited by the relevant livestock assurance schemes.'

REFLECTIONS

All the UK's leading food retailers publicly address the issue of animal welfare, and emphasised their commitment to it, but several issues merit reflection and discussion. While many of the retailers were emphatic in emphasising their strategic commitment to animal welfare, such commitments were also seen to make good business sense. As such the food retailers' commitments to animal welfare can be seen to be consistent with Schulze et al.'s (2019) findings that a focus on animal welfare can achieve more successful marketing. However, some of the food retailers' commitments to continuing improvements in animal welfare can be seen to be aspirational and expectational. Such corporate aspirations and expectations certainly reflect public concerns about animal welfare but given that the leading retailers source animal products across extensive geographical areas, fulfilling such aspirations presents complex challenges. The leading food retailers' future commitments on animal welfare, may demand changes in their current business models, which depends, in part, on large scale regular supply of competitively priced animal products. Here, Amos and Sullivan (2019, p. 8) suggested that 'customer willingness to pay continues to be the principal barrier to adopting higher standards of farm animal welfare.'

At the same time, the leading retailers' commitments to animal welfare are at least one step removed from their own operations, and this reduces their control over animal welfare. Here, a major element in the leading retailers' approach to animal welfare is the regular independent audits of their suppliers. However, in examining consumer concerns about food safety, the environment and animal welfare, Haggarty (2009, p. 767) argued that under neoliberal schemes, audit-based governance is effectively shaped by the food industry itself, and that 'grocery marketers translate consumer preferences into checklists of acceptable farming practices in negotiation with farming sector lobbies, consumer groups and other participants in agri-food systems.' More specifically, in reviewing the role of 'audit in animal welfare', Escobar and Demeritt (2016, p. 171) highlighted the general 'tendency for audit processes to become decoupled from the qualities they are meant to assure.' As such, there is the danger that the audit exercises which the leading food retailers claim as a major feature of their corporate commitment to animal welfare, become a routine reporting end in themselves, rather than a means to an end.

A number of the leading food retailers look to signal, or reference, their commitment to animal welfare in dedicated welfare reports or more often in their annual corporate social responsibility/sustainability reports, and thus it would seem to be appropriate for them to publicly report on achievements in

meeting such commitments, in these reports. While the animal welfare reports posted by three of the leading food retailers, identified earlier, did include some quantitative measures of animal welfare achievements, they fell short of the detailed key performance indicators outlined by Lindgreen and Hingley (2003) almost two decades ago. If the UK's leading food retailers are to build confidence and stakeholder trust in their delivery of animal welfare commitments, and to avoid accusations of greenwashing, or perhaps more accurately of welfare washing, this effectively demands independent external assurance of the reporting process. While commissioning comprehensive independent external assurance, within large, complex and geographically widespread supply chains can be a costly and time-consuming process, it is one which the UK's leading food retailers will need to address more wholeheartedly, as recommended by Jones et al. (2014), if they are to establish the integrity and credibility of their commitments to animal welfare.

The food retailers, and more generally the food industry, face strident public and pressure group criticism about animal welfare. Tescopoly (undated, webpage), for example, an alliance launched in 2006 to highlight and challenge the negative impacts of Tesco's behaviour along its supply chain, argued that 'supermarkets have enormous influence over the animal welfare standards used to produce the meat, milk and eggs that they sell.' Further Tescopoly (undated, webpage) argued that 'as a result of supermarket buying power, which drives down prices paid to suppliers, farmers are expected to work to impossibly small margins', that 'in many cases they have no option but to intensify production in order to try to cover their costs' and it concluded that 'the capture and control of the whole food supply chain by the supermarkets is a major contributor to poor animal welfare.'

At the time of writing, it is impossible to consider the leading UK food retailers' approach to animal welfare issues without some reference to COVID-19, not least because the pandemic has disrupted global supply chains and changed consumer habits and behaviours. On the one hand, trade reports that many abattoirs and meat packing and processing plants were COVID-19 hotspots and were closed, albeit temporarily, and restrictions on international trade have disrupted many traditional supply chains. On the other hand, public fears and concerns about the COVID-19 pandemic, about the claimed tracing of its origins to a wholesale food market in China, and about the reported incidences of high levels of the virus amongst people working in food processing and packing plants in a number of countries, have heightened consumer awareness about the safety of animal products within food supply chains.

Given the wide-ranging impact of COVID-19, it remains to be seen if, the leading food retailers will continue to commit the financial resources required to address continuing animal welfare concerns, or if they will concentrate on looking to restructure their business models to better respond to new consumer demands in a changing business environment. Looking to alternative futures, Plant Based News (2020, webpage), a UK based media outlet producing content about veganism and plant based living, suggested that 'with growing concerns about food safety in light of the COVID-19 pandemic and estimates that three out of every four new or emerging infectious diseases in people come from animals, it's about time that food companies ramped up their efforts to prevent the spread of such diseases.' Further Plant Based News (2020, webpage) claimed that 'the immune systems of animals raised on lower welfare factory farms are far weaker than any other; couple this with the immense overcrowding seen on these intensive farms - where some 90 percent of farmed animals are raised - and the risk of contracting and spreading dangerous diseases is worryingly high.'

Finally, the findings of this exploratory paper also have some implications for the conceptual approaches to corporate social responsibility. On the one hand, within the context of stakeholder theory, the findings suggest that the leading food retailers increasingly recognise the importance consumers attach to animal welfare, At the same time the findings also raise questions about how retailers will accommodate strident animal welfare pressure group campaigns, which may not necessarily reflect the opinions of many consumers who may be unwilling to pay higher prices for their meat products, within their animal welfare policies. On the other hand, critical conceptual approaches, based in political economy, which stress that current business models rely on the exploitation of natural capital, strike a chord with pressure group criticisms strident criticisms of animal welfare within the retailers' supply chains. In a simar vein, Hannon and Fleming's (2019) argument that the leading food retailers' commitments to animal welfare are but a smokescreen to draw attention away from what critics would see as their unsavoury business model, resonates.

CONCLUSIONS

This paper has outlined the ways in which the leading UK food retailers have publicly addressed commitments to animal welfare in their animal welfare statements and their corporate social responsibility/sustainability reports. Six interlinked themes illustrate the retailers' approach to animal welfare namely, strategic corporate commitment, animal welfare as good business strategy, a focus on supply chains, policies on specific categories of animals and animal products, antibiotics, and auditing. At the same time, some of the food retailer's future commitments to continuing improvements in animal welfare were aspirational, and at least one step removed from production, and there are concerns both about auditing, and the external assurance of their achievements in meeting commitments, and about public unease about the welfare of animals in the retailers' supply chains. The paper has its limitations, not least in that it draws its empirical material exclusively from Internet sources and does not include any empirical information form the leading retailers or their suppliers, but the authors believe that as an exploratory paper it provides a platform for future research in what seems likely to become an important area for scholars interested in food retailers' approach to animal welfare.

Looking to the future, the leading UK food retailers' approach to animal welfare certainly offers a wide variety of research agendas for retail and business and management scholars. At a conceptual level, for example, animal welfare provides opportunities to test, develop and refine stakeholder theory by exploring how the positions of different groups of stakeholders within food retailing are incorporated into corporate decision making about approaches to animal welfare. At the same time, analysis of both changing perceptions of the importance of animal welfare considerations, as well as how such changes might be balanced against other corporate goals within materiality assessments which underpin stakeholder engagement within corporate social responsibility reporting processes, will contribute to stakeholder theory.

In a more radical vein, the retailers' approaches to animal welfare might also help to further illuminate and develop critical theories that look understand business operations and strategies under capitalism, and from a neoliberal perspective. Here, for example, a focus on exploring alternative ways of organising food retailing, possibly more communally at a local level, for example, and making it more accountable to animal welfare considerations, might be seen to contribute to calls by Amsler (2019) to explore alternative ways of organising life, and by Higgins-Desbiolles (2020) to make businesses more accountable to ecological and social limits.

On the empirical side, a wide range of research opportunities can be identified. At the corporate level, for example, research may help to increase understanding not only of why, and how leading food retailers develop their policies on animal welfare and how they look to elicit stakeholders' opinions, but also of how they take account of wider pressure group campaigns in formulating such policies. Research into how animal welfare concerns inform the relationships between the leading food retailers and their suppliers and on the locus of power within such relationships, also merits attention. At the same time, research on if, and how, more explicit and verifiable animal welfare policies affect profit margins, stock market performance and reputation, will inform understanding of the workings of new business models within food retailing. At the operational and consumer level, many research questions arise including, how the leading retailers have incorporated animal welfare policies into both general marketing messages as well as into marketing messages at the point of sale; if greater consumer awareness of a company's approach to animal welfare influences buying behavior and retailer patronage; and although the current paper has explored large retailers' approaches to animal welfare, an examination of small and medium sized retailers' policies on animal welfare, would broaden the scope of this genre of work.

REFERENCES

Aldi (2020), 'Animal Welfare', available at: https://www.aldi.co.uk/about-aldi/corporate-responsibility/resources-for-our-products/animal-testing-and-welfare (accessed 23 September 2020)

American Veterinary Medical Association (2010), "Animal Welfare! What Is It?" available at: https://www.avma.org/resources/animal-health-welfare/animal-welfare-what-it (accessed 24 July 2020)

Amos, N. and Sullivan, R. (2019), "The Business Benchmark on Farm Animal Welfare Report 2019", available at: https://www.bbfaw.com/media/1788/bbfaw_full-report_2019.pdf (Accessed 29 September 2020)

Amsler, S. (2019), "Gesturing towards radical futurity in education for alternative futures", Sustainability Science, Vol. 14, pp. 925-930

Anselmsson, J. and Johansson, U. (2007) "Corporate social responsibility and the positioning of grocery brands: An exploratory study of retailer and manufacturer brands at the point of sale", International Journal of Retail and Distribution Management, Vol. 35, no. 10, pp. 835-856

Asda (2017) "Animal Welfare Policy", available at: http://s7d2.scene7.com/is/content/asdagroceries/Asda.com/7.%20Sites/Environment/Animal%20welfare%20policy_0.pdf (accessed 22 September 2020)

Buller, H. (2016) "Animal Geographies III; Ethics", Progress in Human Geography, Vol. 40, No. 3, pp. 422-430

Buller, H. and Roe, E. (2018), "Food and Animal Welfare", Bloomsbury Academic, London.

Castro, C. (2004) "Sustainable Development: Mainstream and Critical Perspectives", Organisational Environment. Vol. 17, No. 2, pp. 195-225

Clark, B., Stewart, G.B., Panzone, L.A., Kyriazakis, I. and Frewer, L.J. (2016), "A Systematic Review of Public Attitudes, Perceptions and Behaviours Towards Production Diseases Associated with Farm Animals", Journal of Agricultural and Environmental Ethics, Vol. 29, pp. 455-478

Co-op (2019), "Co-op Animal Welfare Standards and Performance and Co-op Antibiotics Policy", available at:https://assets.ctfassets.net/bffxiku554r1/vSmTTROxs7uNGvtKauQBj/c4b9c573798420426038ed74802c5ac5/Co-op_Animal_Welfare_Standards__Performance_and_Co-op_Antibiotic_Policy.pdf (accessed 23 September 2020)

Corden, A. and Sainsbury, R. (2006), "Using verbatim quotations in reporting qualitative social research: Researchers' Views", available at: https://www.york.ac.uk/inst/spru/pubs/pdf/verbquotresearch.pdf (accessed 8 July 2020)

Escobar, M.P, and Demeritt, D. (2017), "Paperwork and the decoupling of audit and animal welfare: The challenges of materiality for better regulation", Environment and Planning C: Politics and Space, Vol. 35, No. 1, pp. 169-190

Farm Animal Welfare Council (2009), "Farm Animal Welfare in Great Britain; Past Present and Future", available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/319292/Farm_Animal_Welfare_in_Great_Britain_-_Past__Present_and_Future.pdf (accessed 9 September 2020)

Garriga, E. and Mele, D. (2004) "Corporate Social Responsibility Theories: Mapping the Territory", Journal of Business Ethics, Vol. 53, pp. 51-71

Gavare, R. and Johansson, P. (2010), "Management for sustainability – a stakeholder theory", Total Quality Management, Vol. 21, No. 7, pp. 737-744.

Haggarty, J. Campbell, H. and Morris, C. (2009), "Keeping the stress off the sheep? Agricultural Intensification, neoliberalism and good farming in New Zealand", Geoforum, Vol. 40, pp. 767-777

Hannon, G. and Fleming, P. (2003) "Updating the Critical Perspective on corporate Social Responsibility", Sociology Compass, Vol. 3, No. 6, pp. 937-948

Hartmann, M. (2011), "Corporate social responsibility in the food sector", European Review of Agricultural Economics, Vol. 38, No. 3, pp. 297-234

Higgins-Desbiolles, F. (2019), "Socialising tourism for social and economic justice after Covid-19", Tourism Geographies, Vol. 22, No. 3, pp. 610-623

Iceland (2020), "Animal Welfare", available at: https://about.iceland.co.uk/doing-it-right/animal-welfare/ (accessed 23 September 2020)

Jones, P., Comfort, D. and Hillier, D. (2007), "Marketing and corporate social responsibility within food stores", British Food Journal, Vol. 109, No.8, pp. 582-593

Jones, P., Hillier, D. and Comfort, D. (2014), "Assurance of the leading UK food retailers' corporate social responsibility/sustainability reports', Corporate Governance, Vol. 14, No. 1, pp. 130-138

Lever J., Evans A. (2017), Corporate Social Responsibility and Farm Animal Welfare: Towards Sustainable Development in the Food Industry? In: Idowu S., Vertigans S. (eds) Stages of Corporate Social Responsibility. CSR, Sustainability, Ethics & Governance. Springer, Cham. https://doi.org/10.1007/978-3-319-43536-7_10 (Accessed 15 September 2020)

Lidl, (2020), "Farm Animal Health and Welfare Policy", available at:file:///C:/Users/Asua/Downloads/Farm%20Animal%20Health%20and%20Welfare%20Policy%202020%20(3).pdf (accessed 23 September 2020)

Lindgreen, A. and Hingley, M (2003), "The impact of food safety and animal welfare on supply chain management; The case of the Tesco meat supply chain", British Food Journal, Vol. 105, No. 6, pp. 328-349

Marks and Spencer (2020), "Our Animal Welfare Policy", available at: https://corporate.marksandspencer.com/stories/blog/our-animal-welfare-policy (accessed 23 September 2020)

Morrisons (2020) "Animal Welfare", available at: https://www.morrisons-corporate.com/cr/policy/animal-welfare/ (accessed 22 September 2020)

Piacentini, M., MacFadyen, L. and Eadie, D. (2000) "Corporate social responsibility in food retailing", International Journal of Retail and Distribution Management, Vol. 28, No. 11, pp. 458-469

Pivato, S., Misani, N. and Tencati, A. (2007) "The impact of corporate social responsibility on consumer trust: the case of organic food", Business Ethics, Vol. 17, No. 1, pp. 3-12

Plant Based News (2020), "Is COVID-19 The Beginning of the End for McDonalds", Available at:ahttps://www.plantbasednews.org/opinion/beginning-of-end-for-mcdonalds (accessed 19 September 2020)

Red Tractor (2020), "Wo We Are", available at: https://redtractor.org.uk/who-we-are/ (accessed 1 October 2020)

Rimmington, M., Smith, J.C. and Hawkins, R. (2006), "Corporate social responsibility and sustainable food procurement", British Food Journal, Vol. 108, No. 10, pp. 824-837

Sainsbury's(2019), "Animal Health and Welfare Policy", available at https://www.about.sainsburys.co.uk/~/media/Files/S/Sainsburys/CRS%20Policies%20and%20Reports/AnimalHealthWelfareReport2019.pdf (accessed 22 September 2020)

Saunders, M., Lewis, P. and Thornhill. A. (2009) Research Methods for Business Students, Prentice Hall, Harlow, UK

Schulze, M., Spiller, A. and Risius, A. (2020), "Food Retailers as Mediating Gatekeepers between Farmers and Consumers in the Supply Chain of Animal Welfare Meat – Studying Retailers' Motives in Marketing Pasture-fed Beef', Food Ethics, Vol. 3, pp. 42-52

Souza-Monteiro, D. and Hooker, N (2017), "Comparing UK food retailers' corporate social responsibility strategies", British Food Journal Vol. 119, No. 3, pp. 658-675

Springer, S. (2010) "Neoliberalism and Geography: Expansions, Variegation and Formations", Geography Compass, Vol. 8, No. 8, pp. 1025-1038

Tesco (2020), "Animal Welfare", available at: https://www.tescoplc.com/sustainability/product/animal-welfare-policy-group/ (accessed 22 September 2020)

Tescopoly (undated), "Animal Welfare", available at: "http://www.tescopoly.org/animal-welfare (Accessed 22 September 2020)

Waitrose (2020,) "Animal Welfare", available at:ahttps://www.waitrose.com/home/inspiration/about_waitrose/the_waitrose_way/waitrose_animal_welfarecommitments.html (accessed 23 September 2020)